SSIS
(Self Sufficiency Information System)
User's Guide

Updated 7/1/2015

Independent Living Program

AD ASTRA PER ASPERA
Kansas
Department for Children
and Families
*Prevention and
Protection Services*

Strong Families Make a Strong Kansas

I. Introduction

SSIS (Self Sufficiency Information System) is a database designed to assist staffs in the regions and PPS administration in managing the Independent Living (IL) program. Youth leaving foster care who lack support are less likely to be prepared for self-sufficiency than youth who have parents or guardians able to provide guidance and support. The IL program provides assistance to those youth in foster care who lack family support.

Consult Section 7000 of the Policy and Procedure Manual regarding independent living and self-sufficiency policies.

SSIS contains the following information on each young person participating in the IL program…

- demographics such as name, client ID, date of birth, and SSN
- high school or GED graduation date
- ETV (Education and Training Voucher) program eligibility dates
- school waiver application tracking
- date youth turns 18, 21, and 23 – milestones within the IL program
- program violation tracking
- expenditure information—money spent on assistance, IL subsidy, and ETV

Some of this information is imported from other systems such as FACTS or SMART, but some is manually entered by PPS administration staff or the IL Coordinator. The following pages will explain SSIS more thoroughly.

II. System Basics

A. Installing SSIS

See Appendix A of this manual for installation instructions. Special instructions must be followed when installing SSIS on a new computer so updates to the program are received automatically. If the computer holding SSIS is ever reimaged and the report feature does not work, a component of SSIS, called Crystal Reports, may need to be reloaded as well.

B. Obtaining a Login and Password

Refer to Section III.A – Adding a User, for instructions on obtaining a login and password.

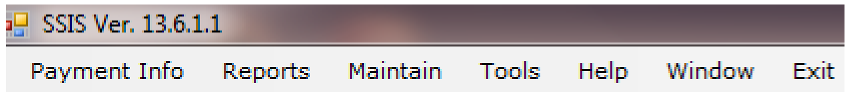
C. Signing In and Forgotten Passwords

A system administrator assigns a Login Name and Password for each user. This is what is used on the login screen.

Forgot your password? An SSIS user assigned an administrator role can reset your password.

D. Opening Screen Menu Options

After entering your login name and password, click <OK>, the SSIS opening screen will appear. At the top of the screen is this menu…



This menu is visible even when menu items are open in SSIS. A menu option is selected by clicking on the title.

E. Maneuvering Open Windows

It is possible to have more than one screen in SSIS open at the same time. Toggle between screens by choosing the menu option “Window” and selecting the desired screen.

A screen can be moved by placing the mouse cursor on the bar at the top of the window  hold the left mouse button down and drag the window to a new location on the screen.

F. Date Displays

There are two places within SSIS where the user needs to enter dates: the Reports menu and the Maintain | Client menu. Each place allows entry of dates differently.

1. Changing Dates – Reports Menu

When selecting a report from the Reports menu option, there are three ways to change or select a date…

a) Typing

Placing the cursor on the first digit of the date field needing to be changed, hit <delete> on the keyboard to remove the current number; type in the new number.

b) Arrow Keys

Placing the cursor on the first digit of the date field needing to be changed, hit the up arrow on the keyboard to increase the number; hit the down arrow to decrease the number. Hit the right arrow to move to the next number in the date; hit the left arrow to move back to the previous number.

c) Calendar

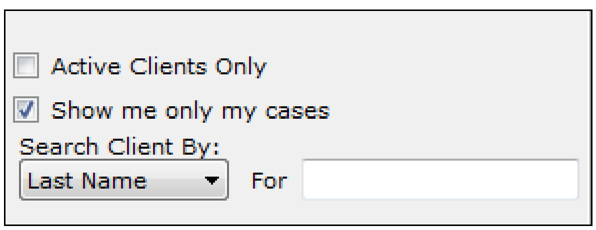
Click the pull-down arrow to the right of each date field to have a calendar appear; select the desired date.

2. Changing Dates – Maintain Menu

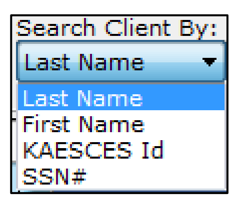
When editing information for a client on the Maintain | Client screen, the user only has one option to enter a date—typing it in.

G. Searching in SSIS

Various screens in SSIS allow for a search of a client or user. This is the search feature on the Payment Info screen:



By clicking the pull-down menu for "Last Name" you see the various search options.



When the name being searched is typed in the field "For," entries matching that criteria will appear in the space below.

NOTE: If searching by KAECSES ID, it is not necessary to type in the leading zeros.

If the word 'search' is not present, look for the magnifying glass icon: . By clicking that icon, a search screen will appear. Here, select how to search, start typing the information being looked for, and the entries meeting that criteria will appear below. Select the appropriate client or user and click <OK>.

H. Sorting in SSIS

All tables that appear on the screens of SSIS have columns that are sortable. In this example, by clicking on the column heading "Acctdate," the table became sorted by accounting date, oldest to newest.

Payment Information

Payment Details

VoucherId	AcctDate	ProgDesc	Amount	VendorId	
	8/1/2006	Subsidy	$300.00		E
	9/1/2006	Subsidy	$300.00		E
	10/1/2006	Subsidy	$300.00		E
	11/1/2006	Subsidy	$300.00		E
	12/1/2006	Subsidy	$300.00		E
00005715	9/9/2010	ETV	$967.00	37550	K
00016013	12/23/2010	ETV	$639.88	5648	G
00026114	4/13/2011	Chafee	$54.00	5648	G
00033378	6/29/2011	ETV	$199.99	84342	C
00036698	8/8/2011	ETV	$85.00	84342	C
00036698	8/8/2011	ETV	$300.00	84342	C
00036698	8/8/2011	ETV	$390.00	84342	C

By clicking the "AcctDate" heading again, the table becomes sorted by the newest to oldest date. This can be done with any column heading.

Payment Information

Payment Details

VoucherId	AcctDate	ProgDesc	Amount	VendorId	
00036698	8/8/2011	ETV	$85.00	84342	C
00036698	8/8/2011	ETV	$300.00	84342	C
00036698	8/8/2011	ETV	$390.00	84342	C
00033378	6/29/2011	ETV	$199.99	84342	C
00026114	4/13/2011	Chafee	$54.00	5648	G
00016013	12/23/2010	ETV	$639.88	5648	G
00005715	9/9/2010	ETV	$967.00	37550	K
	12/1/2006	Subsidy	$300.00		E
	11/1/2006	Subsidy	$300.00		E
	10/1/2006	Subsidy	$300.00		E
	9/1/2006	Subsidy	$300.00		E
	8/1/2006	Subsidy	$300.00		E

I. User Roles

Following are the roles available for use in SSIS. For all users, access to one or more region can be assigned.

Regional Office Viewer – View only access to menu options available to a Regional Office User.

Regional Office User – Update capability for entering information on Maintain | Client : notes, school attendance, ETV participation, violations.

Regional Office Administrator – Same access as Regional Office User PLUS can add new users to the system and update passwords.

Central Office Viewer – View only access to menu options available to a PPS Administration User.

Central Office User – Update capability same as Regional Office User, but can also enter waiver approval information on Maintain | Client.

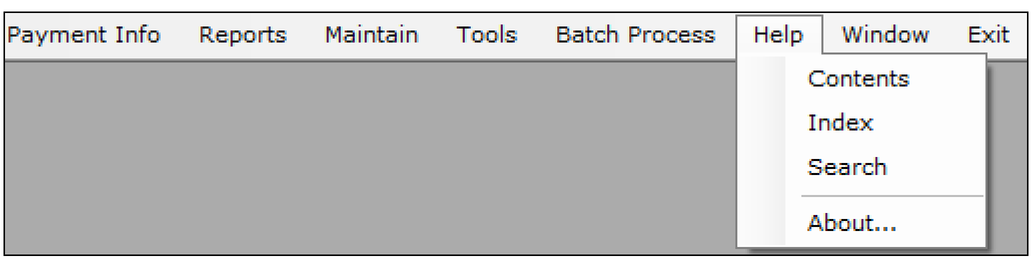
Central Office Administrator – Same access as a Central Office User PLUS can add new users to the system.

Power User – Complete access to all system menus; reserved for the SSIS Administrator and programmer.

	View Screens	Maintain | Client Manually enter client	Maintain | Client Manually Enter Other Info	Maintain | Client Manually enter School Info	Maintain | Client Manually enter Waiver Info	Batch Processes | Import SMART Data	Reports (All)	Tools | User Activity
Regional Office Viewer	x						x	
Regional Office User	x		x	x			x	
Regional Office Administrator	x		x	x			x	x
Central Office Viewer	x						x	x
Central Office User	x		x	x	x	x	x	x
Central Officer Administrator	x	x	x	x	x	x	x	x
Power User	x	x	x	x	x	x	x	x

J. Help Menu

(NOT AVAILABLE – IN PROGRESS) The Help menu contains an on-line version of the SSIS user's guide. *Contents* contains the entire user's manual. *Index* allows the user to browse the manual by subject. *Search* allows the user to search the manual by word or phrase.



III. Maintenance Functions

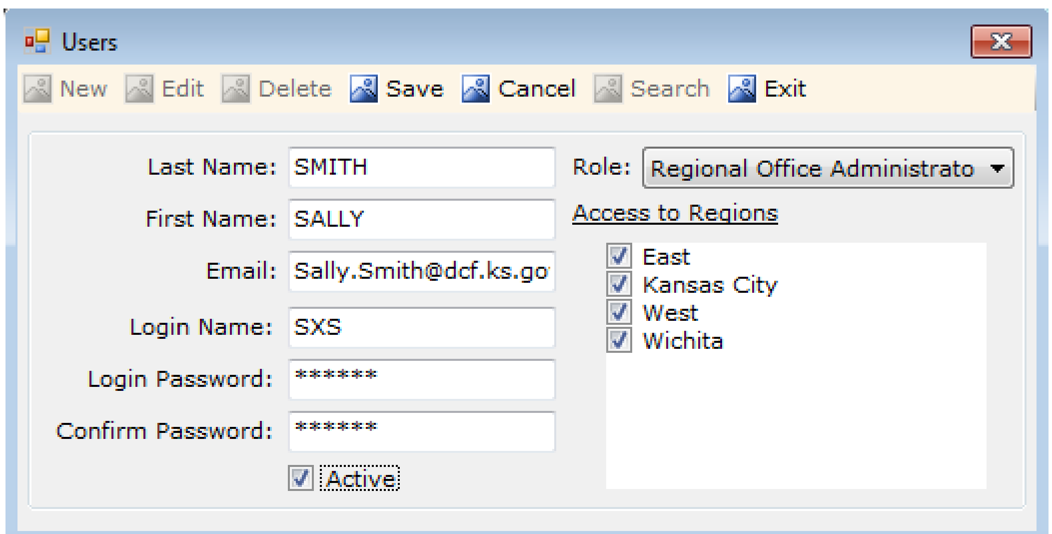
A. Add Users

To add a new user: (NOTE: only Administrator roles allow this function)

1. Send the SSIS System Administrator an e-mail with the following message:

   Please allow (user name and Outlook e-mail address) access to SSIS system and updates.

2. In SSIS, select Maintain | Users
3. Click <New>. A window opens to enter the new user's information.



Last Name = Enter last name as it appears in Outlook

First Name = Enter first name as it appears in Outlook

Email = Enter Outlook email address

Login Name = Enter Alias as displayed in Outlook Address Book

Login Password = no restrictions

Confirm Password = type password again; must match first attempt

Active = If this user is an active user, check the box. Active means the user has a current need for SSIS.

Role = See Section II for definition of the various user roles available.

Access to Regions = Check the regions this user needs access to. The administrator entering a new user into SSIS cannot assign more regions than they have been assigned.

Once the information is entered, click <Save>.

4. When the SSIS System Administrator has confirmed access to SSIS, ask your local IT staff to set the new user up with the SSIS icon. See Appendix A for instructions for local IT staff.

B. View/Edit a User

All users can maintain their own userid in SSIS. If a user forgets their password and is unable to sign on to SSIS, an administrator can assign the user a new password.

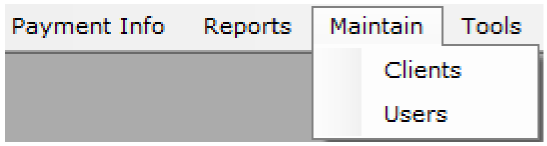
To view or edit a current user:

1. Select Maintain | Users
2. Click <Search> to locate the user.
3. With user showing on screen, click <Edit> to make changes.
4. Make needed changes. Click <Save> to save your changes, or <Cancel> to exit edit mode without saving any changes.

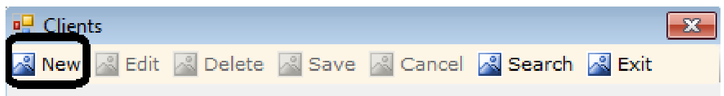
C. Add a New Client

Regional office or PPS administration staff may enter a new client into SSIS. Client identifying information (name, date of birth, SSN, county) are retrieved from FACTS when a new client ID or SSN is entered into SSIS. If a client is not known to FACTS, have the client entered in FACTS (when appropriate) and then try again. If client is unknown to FACTS, contact PPS administration staff to have client manually entered into SSIS.

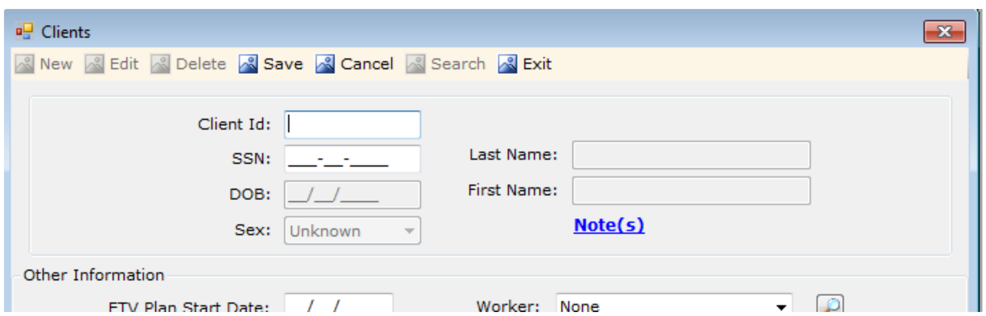
1. Select Maintain | Clients



2. On the screen that opens, click New.



3. Fields will become enterable.



a. Enter Client ID without leading zeros or enter SSN.

b. Hit <tab> (the system will check FACTS); if there is a match, SSIS will populate the other fields with the client's information. If no match is found,

   i. If applicable, enter client in FACTS and try again.

   ii. If entry into FACTS does not apply, contact a PPS administration staff for assistance. See Section IV for PPS Administration instructions on entering a client manually.

c. Click <Save> when finished, or <Cancel> if you do not wish for your entry to be saved.

D. View/Edit a Client

See section IV.B. for details on how to edit or view an existing client record in SSIS.

E. Worker Caseloads

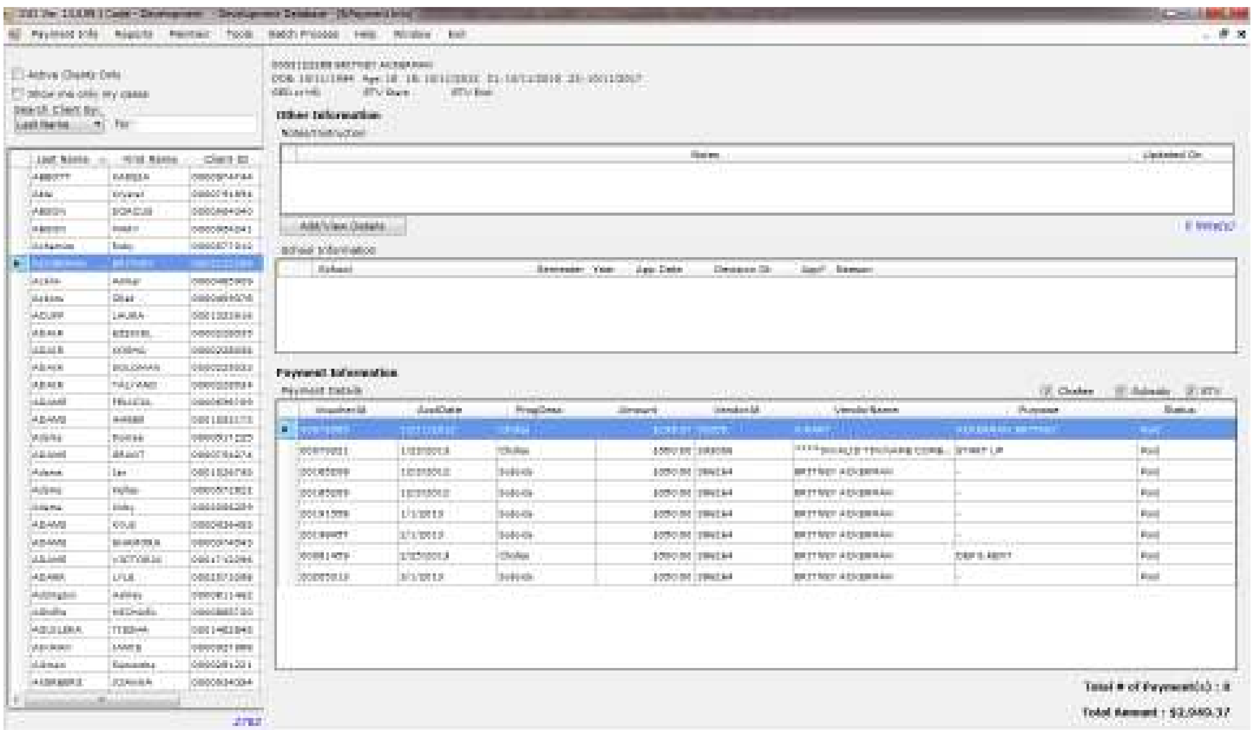
The IL Coordinator assigned to a case is established on the Maintain | Clients screen. See section IV.B. regarding how to edit or view an existing client record so the worker can be added or changed.

To view a listing of all cases and worker's assigned, view Reports | Client List. Run the report for your region and then save it as a spreadsheet to sort and view workers assigned to each client or to see which clients in your region do not have a worker assigned.

IV. IL Coordinators Functions

A. View Client Payment Information

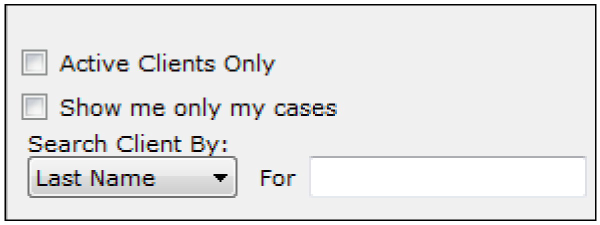
Clicking the Payment Info menu option opens a view-only screen which displays youth in the IL program, their demographics, and payment expenditures.



1. Choosing a Client

The user can view only active clients and/or only clients in their caseload by applying checkmarks in the appropriate boxes.

(Go to Maintain | Client to establish a client as "active" or to assign a worker to a client.)



The "Search Client By" option lets the user move quickly to their chosen client.

2. Filtering Payment Information

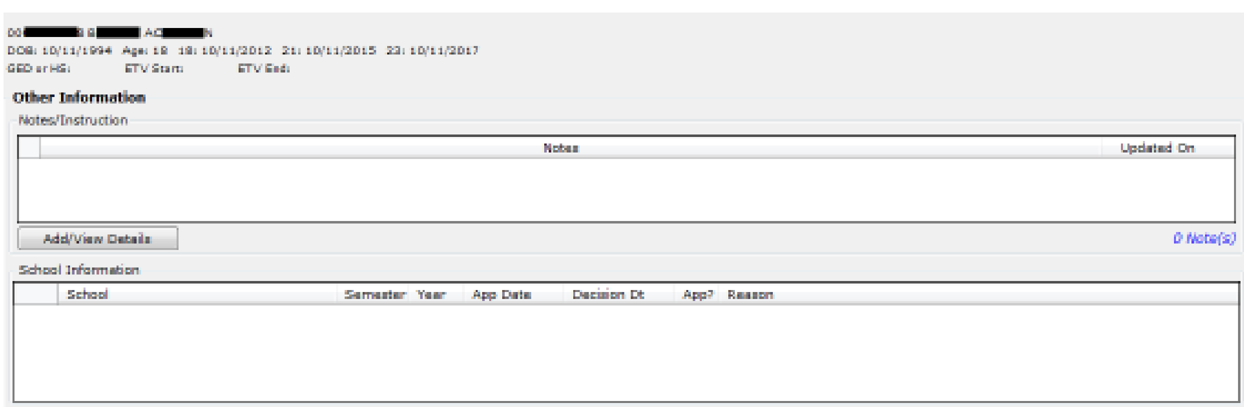
The Payment Information Section of the screen displays Chafee, Subsidy, and ETV payments associated with the client selected.

As the default, all payment sources are displayed, but the user can uncheck a box or boxes to display only a certain type of payment(s).

The payments displayed can also be rearranged by clicking on the header row of any particular column. (See Section II.H.)

3. Client Details, Notes, and Waiver Information

The top portion of the right side of the screen displays the selected client's ID#, name, date of birth, dates of significant birthdays, high school or GED graduation dates, and ETV dates. This information is entered and edited on Maintain | Client (see Section IV.B.)



The Notes/Instruction section acts as a log, available to any user of the system. To add a note, or view the entire note, click <Add/View Details>.

School Waiver Information is entered by PPS administration personnel. (See Section V for details.)

B. Add Other Information to a Client

Once a client is in SSIS, IL Coordinators are responsible for entering the following information into the system:

- worker assigned to case (IL Coordinator)
- high school or GED graduation date
- if case is "active" (client is participating in IL program)
- ETV participation
- violation notice tracking
- notes

PPS administration staffs are responsible for entering school waiver application information.

1. Select Maintain | Clients

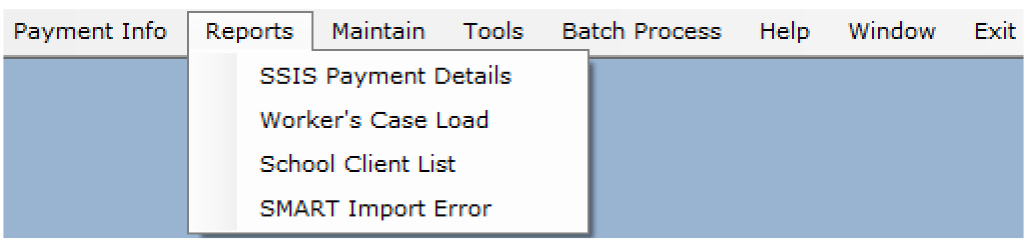
2. On the screen that opens, click Search and locate the client to which information needs to be added.

3. With the client on the screen, click Edit. This will open the screen for data entry. Once information has been added, Click <Save>.

C. Reports

There are three report options from the Reports menu of interest to IL Coordinators.

- *SSIS Payment Details* lets the user print a report of expenditures for one or several youth.
- *Worker's Case Load* displays the clients assigned to a particular worker at the time the report is created.
- *SMART Import Error* report displays the current errors from importing SMART payment information.



There is a fourth report, "School Client List," created to assist PPS administration in the management of the School Waiver Program. See Section V for details on that report.

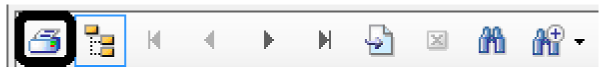
1. Establishing a Reports Folder

All reports ran and saved from SSIS are stored, as the default, in a folder you create called C:\temp\SSISReport. If you have not created this folder the first time you try to save a report, an error message will appear informing the user to create the folder. If you need assistance creating the folder, contact your local IT staff.

2. Saving a Report

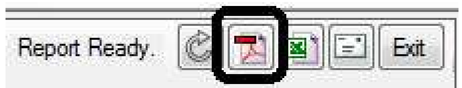
After running a report, the report will open in a new window. This window offers options such as printing or saving the report.

Printing the Report



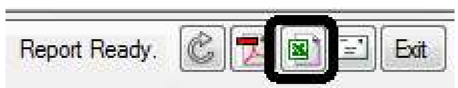
(Left side of tool bar.)

Save to PDF



(Right side of tool bar.)

Save to Excel

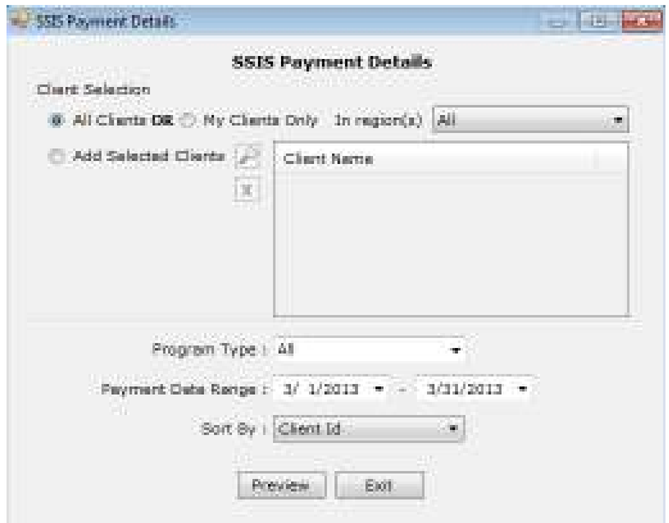


(Right side of tool bar.)

Send report via E-Mail

(Right side of tool bar.)

3. Report - SSIS Payment Details

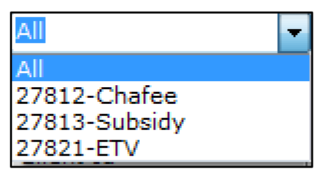


Client Selection options…

- All Clients (all clients in SSIS);
- My Clients Only; or,
- Add Selected Clients

To add selected clients, click the magnifying glass icon, , which brings up a search screen. Search and select a client which will place that client's name in the "Client Name" box on the right of the screen. If more than one client is desired, keeping searching and selected until all clients needed are displayed.

Program Type…

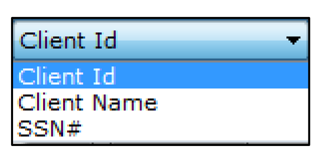


"All" program types display as the default. Select from the pull-down menu if only one particular funding source (program) is desired.

Payment Date Range…

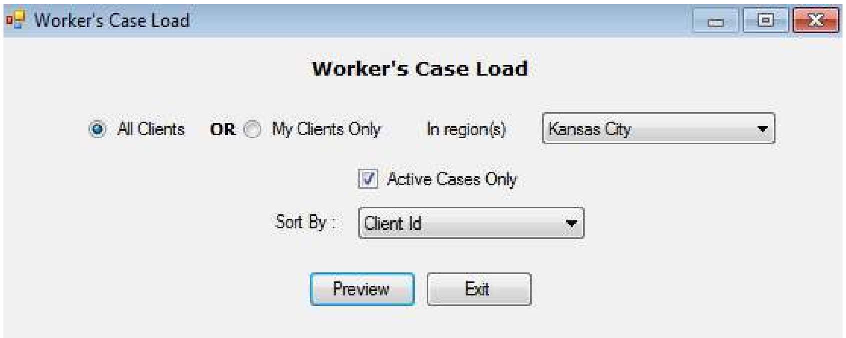
Payments are in SSIS starting with FY08 (July 1, 2007). Select a range involving any number of days, weeks, or years.

Sort by…



The default sort order is Client ID, but the user can choose to sort the report by client name or SSN.

4. Report – Worker's Caseload



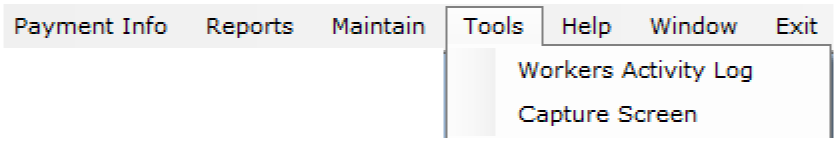
Any client in SSIS where a worker is assigned on the Maintain | Client screen, a list of clients assigned to workers can be obtained through this report. To see which cases have not been assigned a worker, run the report to include all regions; save it as a spreadsheet. The spreadsheet can then be sorted by worker to see which cases are assigned to whom and which have no worker assigned yet.

5. Report – SMART Import Errors

Weekly, payments from SMART are imported into SSIS. If the client cannot be found during the import process the payment moves to the error table. The SMART Import Errors report displays these errors. The report displays the Operator ID of the person who entered the payment in SMART. IL Coordinators should run this report often and see that errors are corrected timely. See appendix B for more information on correcting these errors in SMART. After an error is corrected and the import from SMART is made, the error will no longer appear on the error report.

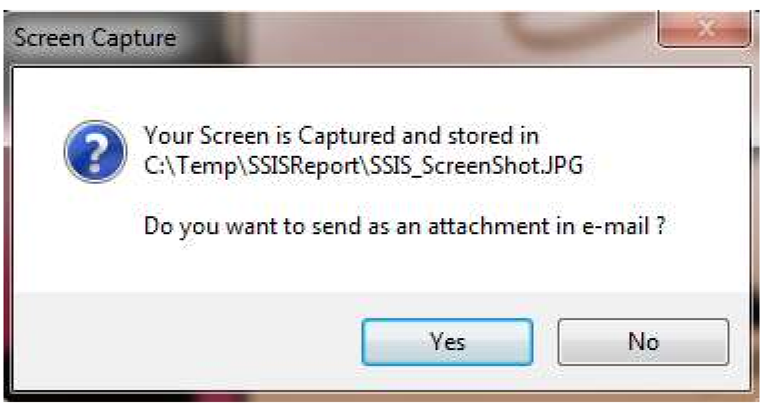
D. User Activity

The Tools menu | Workers Activity Log allows a user to see what activity has occurred within SSIS for a specific date range. This function is open to all users, but is most useful to supervisors or system administrators.



E. Capture Screen

The Tools menu | Capture Screen allows a worker to capture a screen shot of the screen they are viewing. The screen shot is saved in the C:\temp\SSISReport folder. The following message appears when Capture Screen is selected. Clicking <Yes> will open an e-mail in Outlook with the screen shot already attached.



V. PPS Administration Functions

A. Adding Clients not in FACTS

When a new client is added to SSIS, identifying information is taken from FACTS. If the client is not known to FACTS, a PPS Administration worker or administrator has the ability to enter the client manually.

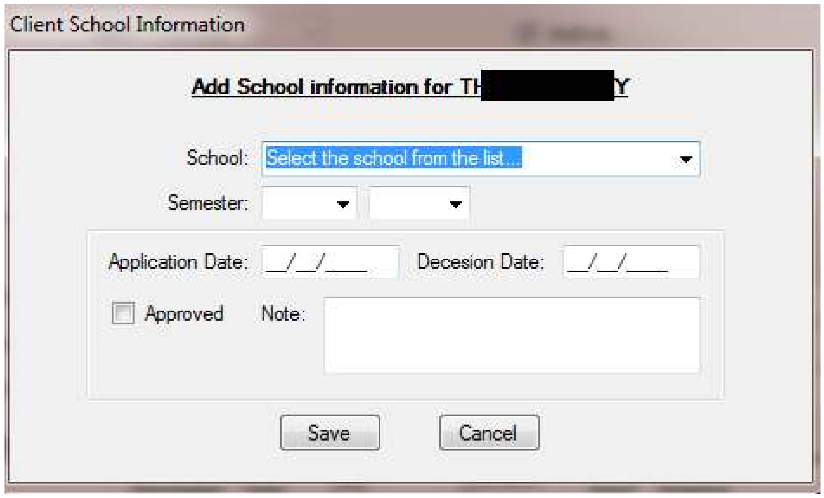
1. From Maintain | Clients, select New.
2. Type in the Client ID or SSN and hit Tab. When the client is known to FACTS, the remaining identifying information (name, dob, etc.) will pre-fill. If the client is not known to FACTS, the following message will appear:

3. Click <Yes>. This will open up the fields for manual data entry.
4. Click <Save> .

B. Entering Tuition Waiver Information

From the Maintain | Clients screen…

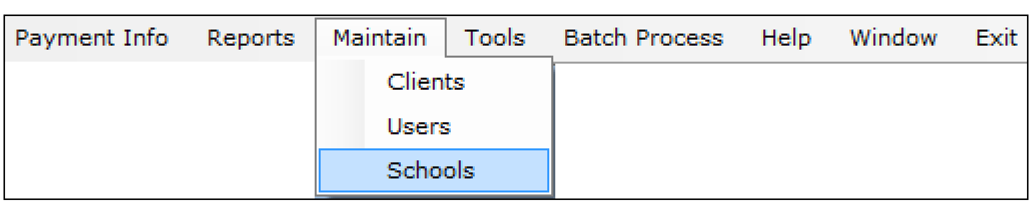
1. Search for the client for whom waiver information needs to be added. If the client is not known to SSIS, follow instructions above to add a client to SSIS.
2. With client displayed, click <Edit>.
3. At the bottom of the screen, click <Add School>. This screen displays.



4. Complete the screen, marking the “Approved” checkbox if the waiver application was approved. Reasons for approving or disapproving the waiver application can be added to the “Note” section.
If the school is not displayed in the pull-down menu, see next section for how to add a school to the list.
5. Click <Save>.
6. Click <Save> on the main Client menu to complete the transaction.

C. Adding School to Drop-Down Menu

To add a school to the drop-down list for tuition waiver approvals, click on Maintain | Schools.



A screen appears that lets the user add a new school or update or delete an existing school in the list. Click <Save> before exiting the screen to save your changes.

D. Report – School Client List

The School Client List report allows the user to run a report of all schools for which a waiver application has been received and entered into SSIS. The report can be run for all schools or for a particular school and for all semesters or a particular semester.

Johnson County Community College
Overland Park
Community College

KAESCESId	Client Name	Application Date	Decision Date	Approval Status	Enrollment Semester	Remark
00[redacted]ER		12/05/2012	12/07/2012	Yes	Spring 2013	approved GUS after 16th bday

# of Clients in the School : 1

E. Import SMART Data

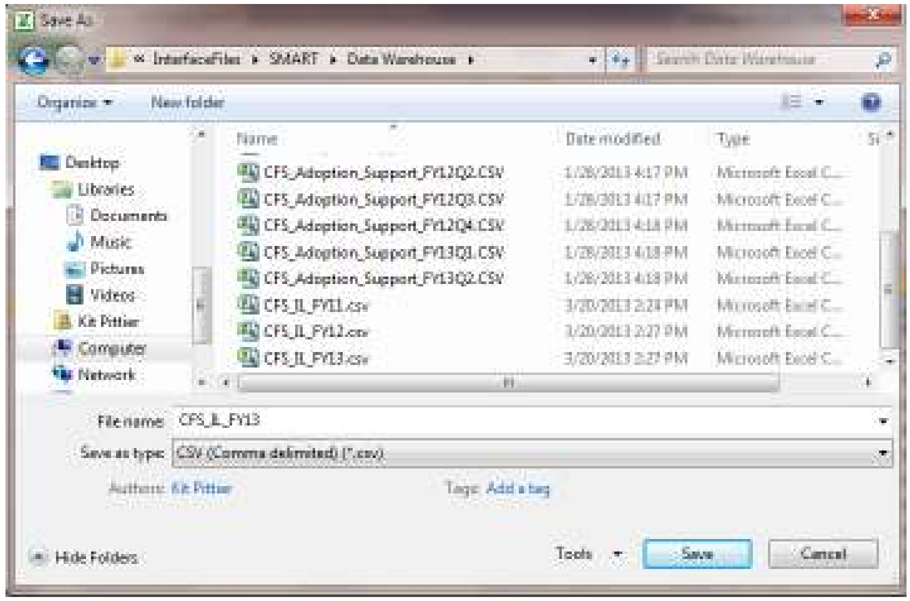
Batch Process | *Import SMART Data* menu option allows the user to import the latest SMART payment information into SSIS. Before the latest files can be imported into SSIS they must be downloaded from SMART.

1. From SMART, run the Data Warehouse report titled CFS – IL/ETV. Each fiscal year is saved in a separate report. (This is due to the row limitations with an Excel 2000 format.) At least weekly, the current fiscal year, to date, shall be run. At least monthly, all previous fiscal years, back to FY11, shall be run, July 1 thru June 30.
2. Save the report by selecting <Download to Excel 2000> and save to…

   S:\Cfs.drw\IT-UNIT\scripts\InterfaceFiles\SMART\Data Warehouse

   SMART only allows the report to be stored in Excel format, but for import into SSIS, the file must be in .csv format.

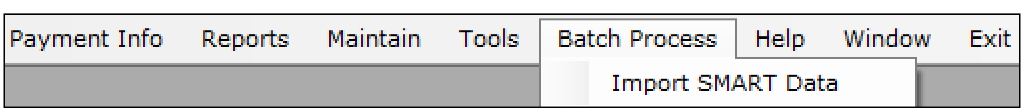
3. For each file created from the Data Warehouse, open it in Excel. Go to File | Save As and select “CSV (Comma delimited)” as the format and the appropriate file name based on the fiscal year: CSF_IL_FY##.csv, where ## indicates the fiscal year.



4. Move the Excel files to the folder “Original Downloads” on the same path.

5. Every Friday night, an automated batch process is in place to download the IL files from the Data Warehouse path described above. If import from SMART is needed sooner, a manual import can be completed.

Go to Batch Process | Import SMART Data.



Select the files to be imported.

Appendix A - Instructions for Installing SSIS Application

NOTE: If you need assistance setting up your "report" folder ask IT to do it for you now. You need an SSISReport folder created on… C:\temp\SSISReport

If user currently has SSIS…

Step 1: Uninstall SSIS program currently on their computer.

For all users…

Step 2: Sign on as the SSIS user to their computer.

Step 3: Go to \\COShared.app.loc\COShared\PPS\Applications\SSISApp\SSISNetSetup\

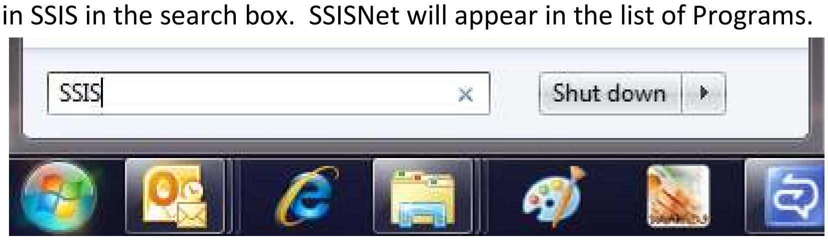
Step 4: Run: setup.exe

Step 5: Create shortcut to the desktop or task bar for the new SSIS application.

Instructions for Users…How to put SSIS Icon in your Status bar:

Go to the Start Menu

Type in SSIS in the search box. SSISNet will appear in the list of Programs.



Right click on SSISNet; select "Pin to Taskbar"

Appendix B – Correcting Errors in SMART

There are three reasons a user may want to make a correction to an IL payment:

- The wrong program funding code was used when the payment was made; or,
- A payment being imported from SMART into SSIS erred due to no client match being found; or,
- The payment was not an IL payment and should not be imported into SSIS.

This process can be used to make any of these types of corrections.

NOTE 1: If you do not have access to SMART, share these instructions with your co-workers who do data entry for payments into SMART.

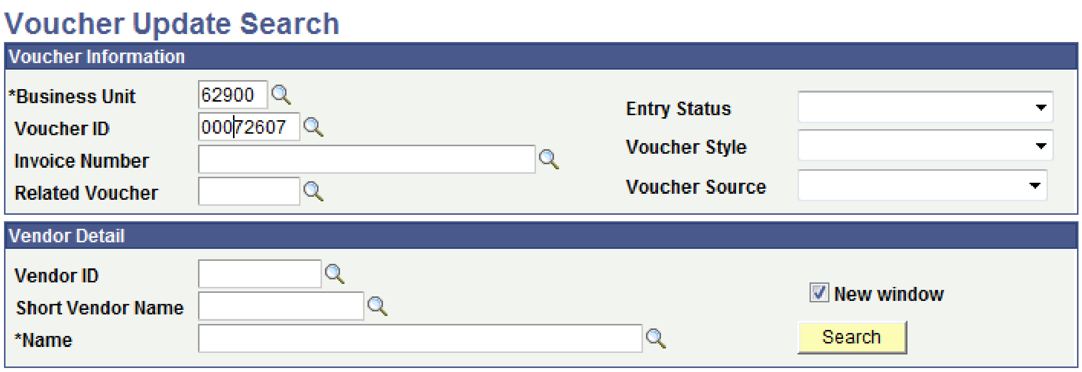
NOTE 2: These corrections are made on the INF45 screen. The SMART user needs the “Agency AP Processor – Additional Voucher Fields” role in order to see this screen.

NOTE 3: This correction process is for SSIS only. For accounting purposes, a Department of Administration staff will need to do a JV to correct the funding.

1. In SMART, go to

    Accounts Payable | Vouchers | Voucher Search

2. Type in the Voucher ID, click <Search>.



3. Click <Select> to open that voucher.

4. Click on the "Invoice Information" tab.

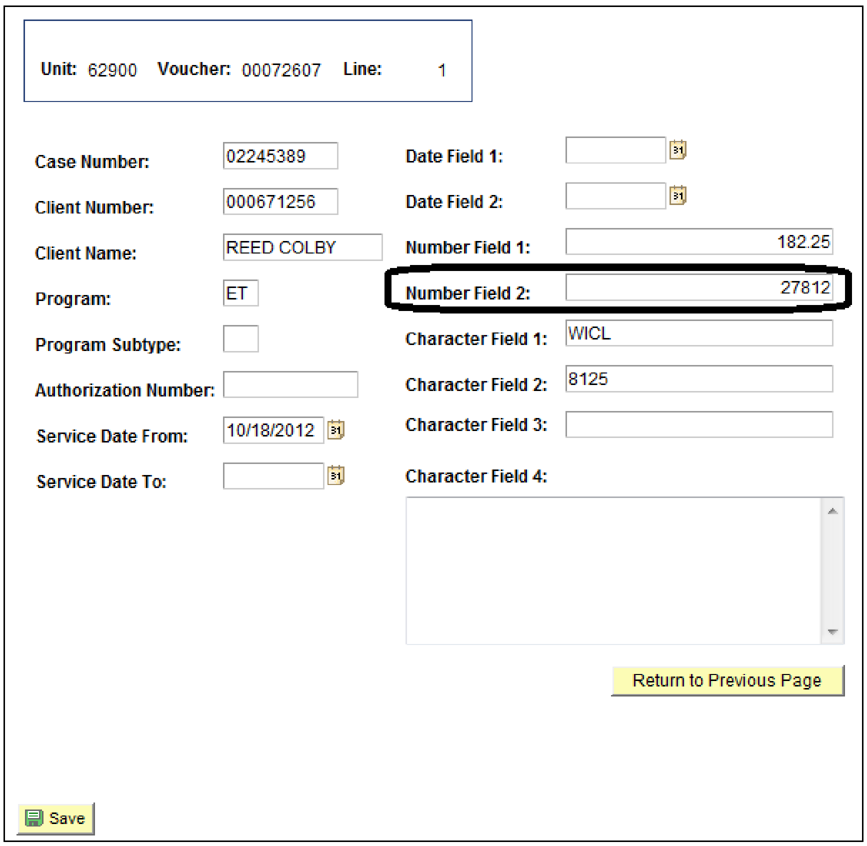
5. In the *Invoice Lines* section, click on "Additional Voucher Fields". This will open the INF45 screen.

6. Make any changes to Client ID or Name, Service Dates, or Character Field 2 (sub-obj code). Click <Save>.

7. Click <Return to previous screen>.

How to Correct the Funding Source

Corrections to program funding source will be made in **Number Field 2**. In this example, the voucher was paid under program code 27821, but it should have been 27812. 27812 was typed into Number Field 2. When this information is imported in SSIS, the system knows to assign 27812 rather than 27821.


Unit: 62900 Voucher: 00072607 Line: 1

Case Number:	02245389	Date Field 1:	
Client Number:	000671256	Date Field 2:	
Client Name:	REED COLBY	Number Field 1:	182.25
Program:	ET	Number Field 2:	27812
Program Subtype:		Character Field 1:	WICL
Authorization Number:		Character Field 2:	8125
Service Date From:	10/18/2012	Character Field 3:	
Service Date To:		Character Field 4:	

Return to Previous Page

Save

How to Ignore a Payment

If the payment is not client specific, or is not an IL payment, so should not be imported into SSIS, type 99999 in the Number Field 2 field. Click <Save>. This will tell the system to ignore this payment when imported into SSIS.